

# **Sage 50 Accounts**

## **Data Management 2025**

# **The Data Management Tool**

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**Sage**

**Sage**



**Data  
Management  
2025**

Sage 50 Accounts

# What's covered in today's webinar?

- Why manage your data?
- What is the Data Management tool?
- What are the steps in Data Management?
- Access the Data Management tool
- Demonstration
- Further support + Q&A



# Housekeeping

The screenshot shows a mobile application interface for a 'Questions' section. On the left is a dark grey sidebar with several icons: a blue flower-like logo at the top, a red microphone icon with a slash through it, a question mark icon, a document icon, an information icon, and a list icon. At the bottom of the sidebar are the words 'Exit' and 'Send'. The main content area is light grey and contains the text 'Questions' at the top right, a question mark icon, and a large dashed arrow pointing from the text 'Want answers?' down to a white input box at the bottom. The input box contains the placeholder text 'Ask the staff a question'. A blue 'Send' button is located at the bottom right of the input box. Three green callout boxes with lines pointing to specific UI elements are present: one pointing to the microphone icon with the text 'Your microphone is muted automatically', one pointing to the question mark icon with the text 'Send us your questions', and one pointing to the document icon with the text 'Download a handout'.

Your microphone is muted automatically

Send us your questions

Download a handout

Want answers?

Ask the staff a question

Exit Send

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# Why manage your data?

## Benefits

- Completely optional process
- Keep your data relevant
- Speed up searches in your accounts
- Avoid errors
- Permanently removes data from your company

## Resolution

As a rough guide we recommend that to optimise performance you have:

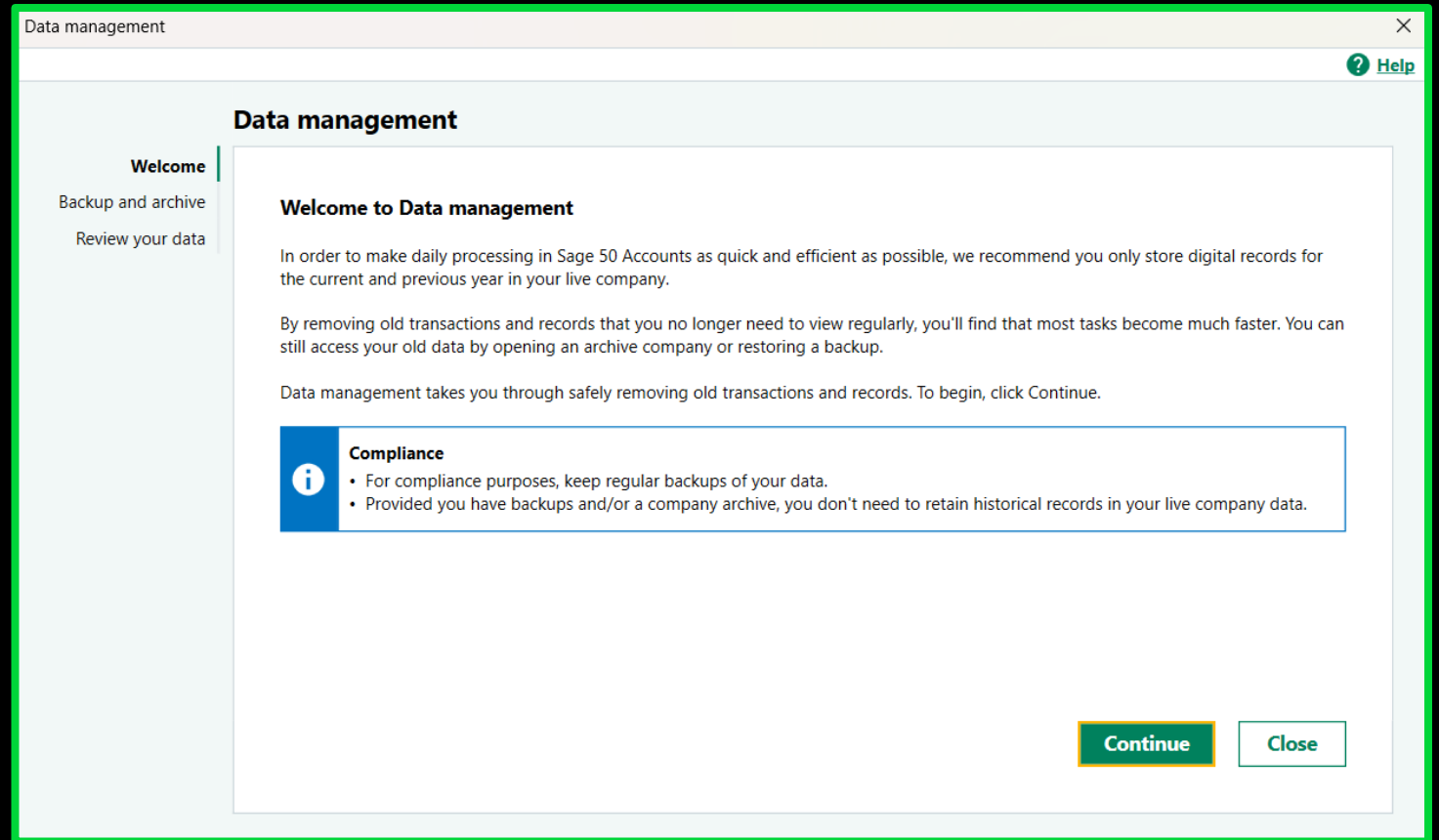
- Fewer than 250,000 transactions, or if using Sage Accounts 2014 or below, fewer than 100,000 transactions
- Fewer than 50,000 invoices
- Fewer than 50,000 sales orders
- Fewer than 50,000 purchase orders
- Fewer than 5,000 customer records
- Fewer than 5,000 supplier records
- Fewer than 20,000 product records
- Fewer than 2,000 project records

[Click here for data limits](#)

# What is the Data Management tool?

## Data Management tool

- Designed to help you maintain the relevance and size of your accounts data



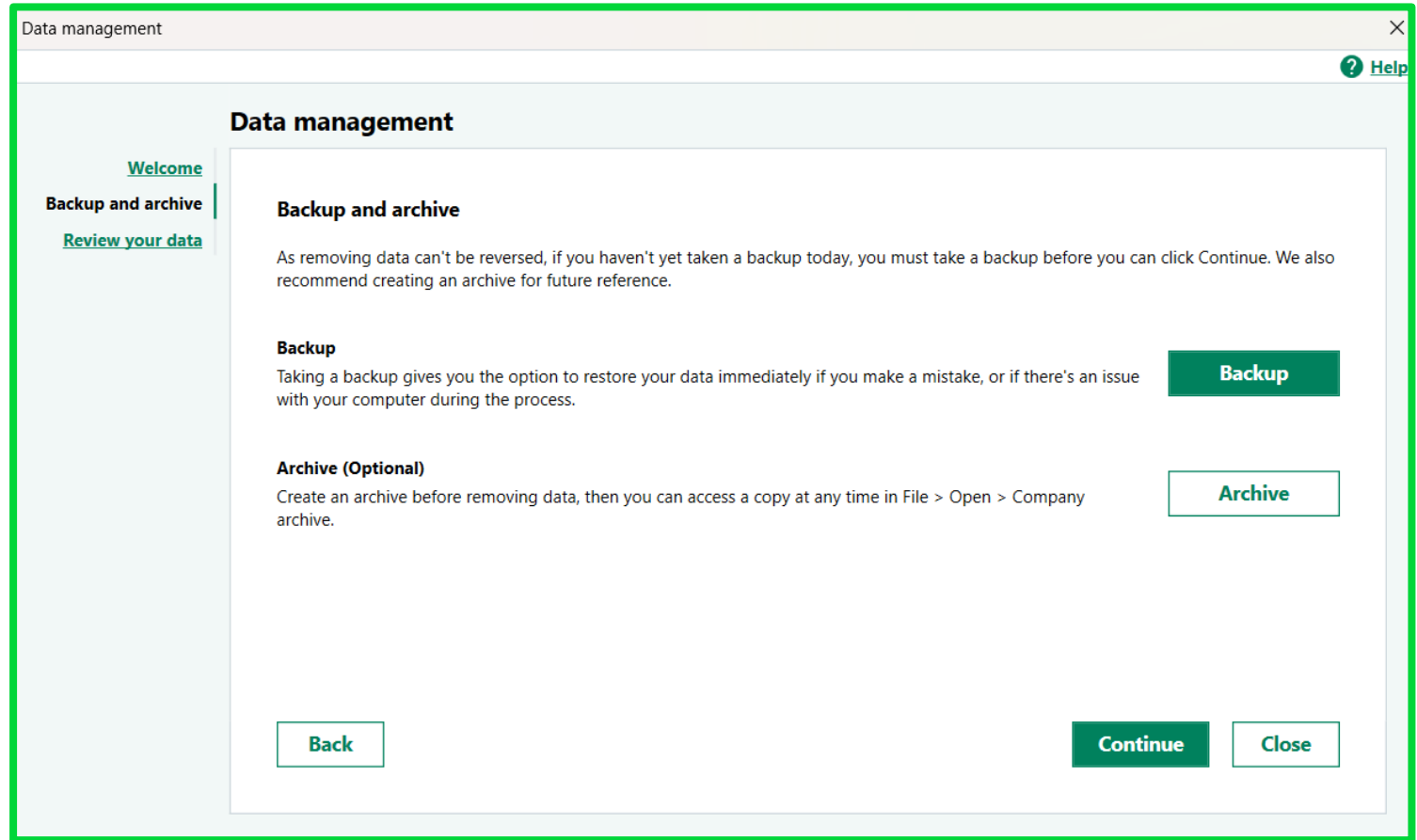
# What are the steps in Data Management

## Back up

- Must be logged in as manager or have the relevant permissions
- File > Backup > OK

## Archive

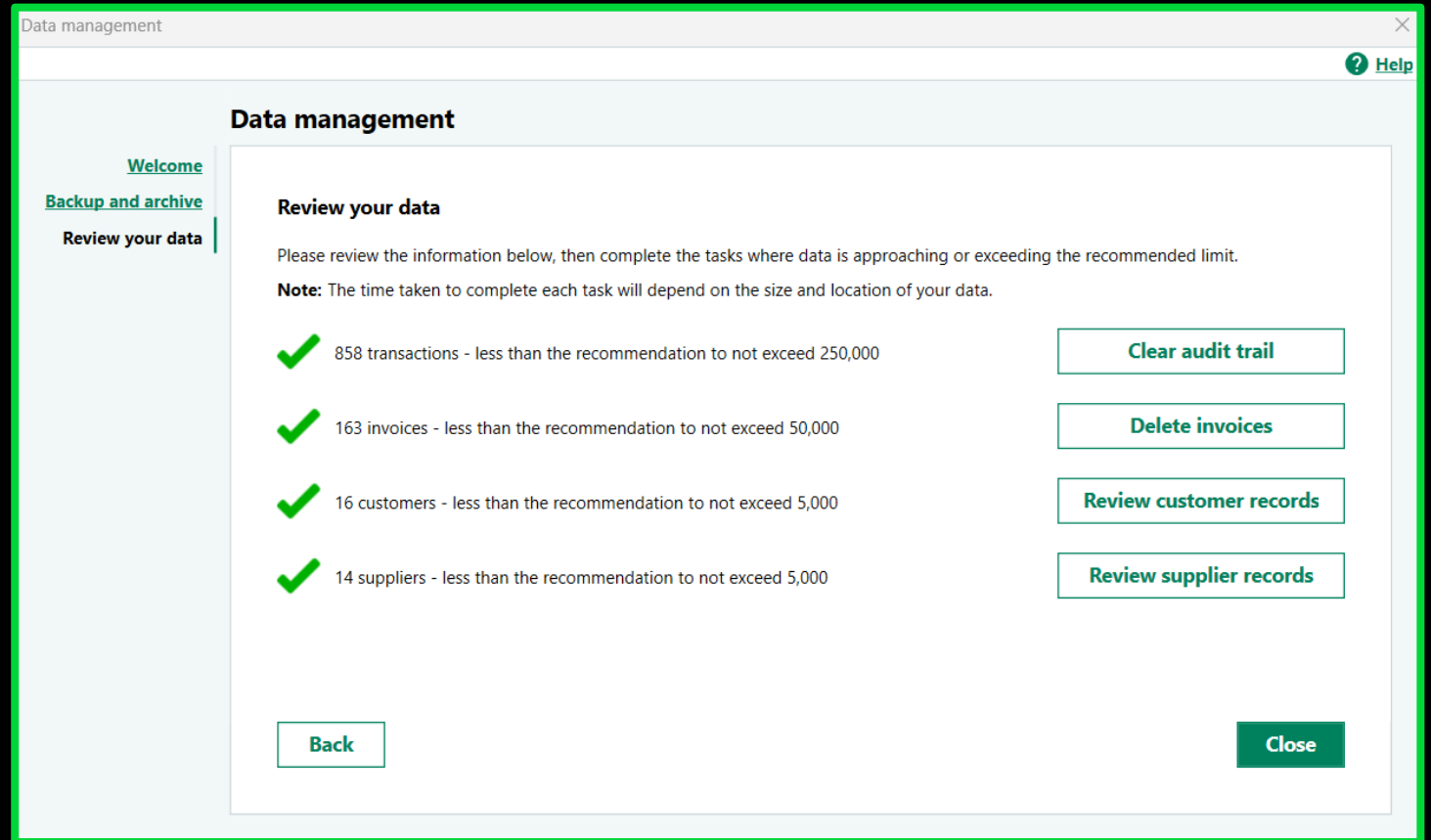
- Must be logged in as manager or have the relevant permissions
- Tools > Period End > Archive Company



# What are the steps in Data Management

## Review your data options

- Clear audit trail
- Delete invoices
- Review customer records
- Review supplier records



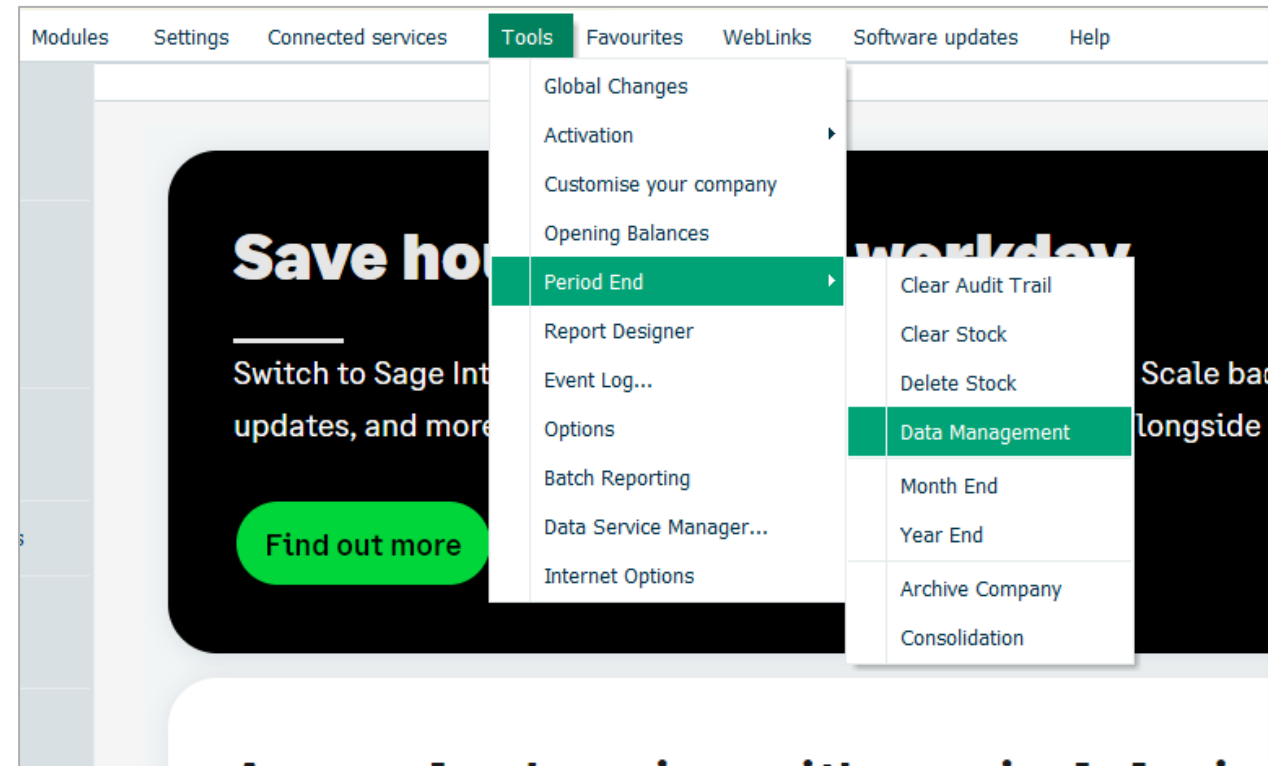
# The Data Management tool

## Access the tool

- Tools > Period End > Data Management

**Note:** If not available:

- Settings > Company Preferences > Parameters > Enable Data Management



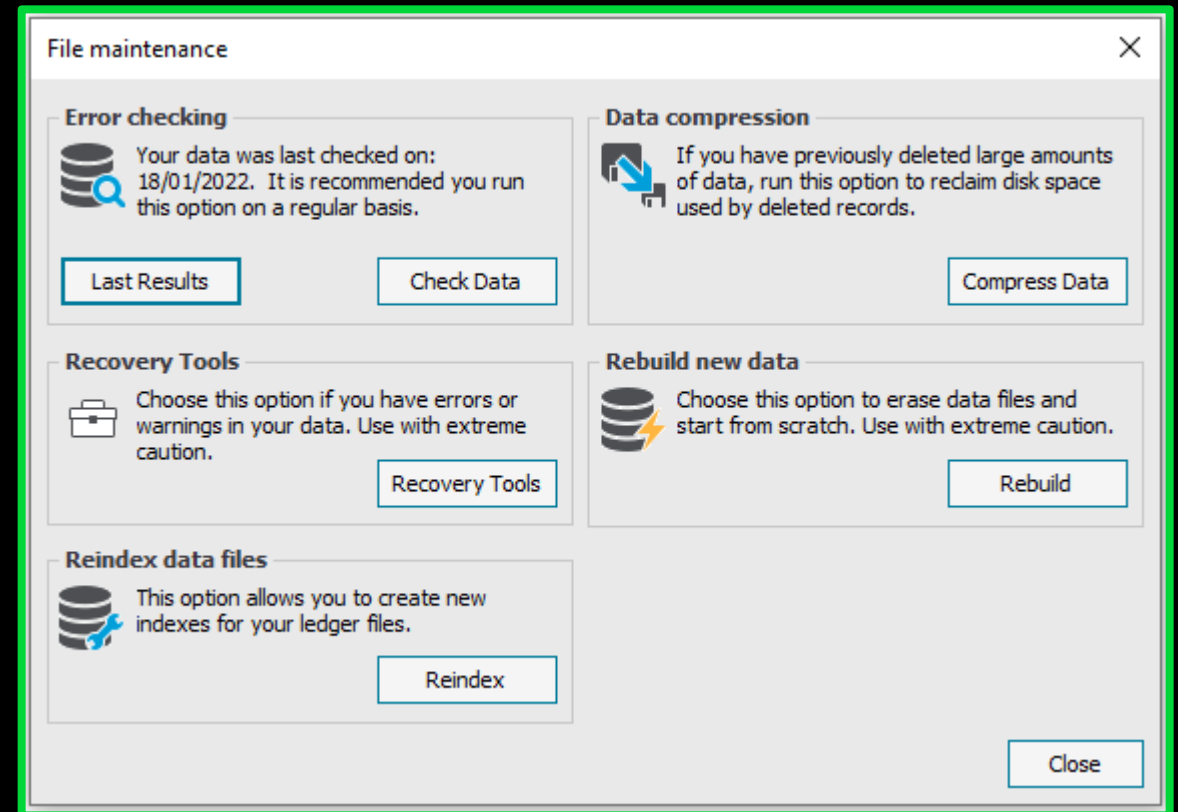


# Demonstration



# Compress data

- After deleting records compress the data to reduce size
- Always ensure you have an error free back up prior to running this routine
- The option can be found within: File > Maintenance



# Summary

- Why data manage?
- Benefits of the Data Management tool
- Demonstration
- Importance of backing up
- Compress your data to reclaim disk space

## How do I use Data management?

*Created on 11 April 2022 / Last modified on 14 February 2024*



### Summary

How to use the new Data management feature in Sage 50 Accounts v28.1 and above.

### Description

[Data management](#) is a new feature designed to make your daily processing as efficient as possible. It notifies you when your data volumes are approaching recommended levels and helps you remove customer and supplier records, audit trail transactions and customer invoices that you no longer need to view regularly. It's easy to use, so let's take a look.

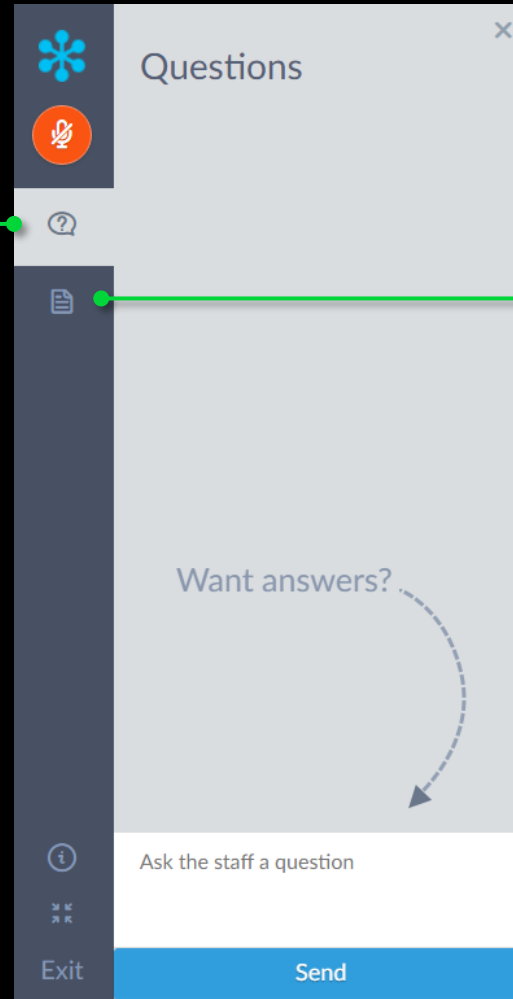
### Resolution

[Click here for article](#)

# Questions

Send us your questions

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